

# Financial Management

I M A G E		L I S T	
<b>0010</b>	Welcome	<b>0290</b>	Potential Tax Savings on Contributions to a Traditional IRA
<b>0020</b>	Our Commitment	<b>0300</b>	Benefits of Employer-Sponsored Retirement Plans
<b>0030</b>	Workbook and Evaluation Form	<b>0310</b>	<b>Save for Retirement</b>
<b>0040</b>	Six Steps to Financial Success	<b>0320</b>	Will the Smiths Have Enough to Retire?
<b>0050</b>	<b>Protect What You Have</b>	<b>0330</b>	The Smiths' Sources of Income
<b>0060</b>	Key Areas of Insurance Coverage	<b>0340</b>	The Smiths' Projected Monthly Income
<b>0070</b>	Health Insurance Marketplace	<b>0350</b>	The Smiths' Retirement Income Shortfall
<b>0080</b>	Three Critical Life Insurance Questions	<b>0360</b>	Developing an Effective Retirement Plan
<b>0090</b>	How Much Life Insurance Do You Need?	<b>0370</b>	How Much Will You Need to Retire?
<b>0100</b>	<b>Take Control of Your Cash Flow</b>	<b>0380</b>	<b>Leave a Legacy</b>
<b>0110</b>	Cash Management Process	<b>0390</b>	Probate
<b>0120</b>	Traditional Savings Vehicles	<b>0400</b>	Federal Estate Taxes
<b>0130</b>	The \$160,000 Credit Card	<b>0410</b>	Long-Term Care
<b>0140</b>	<b>Invest Wisely</b>	<b>0420</b>	The Cost of Long-Term Care
<b>0150</b>	Mr. and Mrs. Taylor	<b>0430</b>	Estate Distribution Techniques
<b>0160</b>	Mr. and Mrs. Taylor	<b>0440</b>	Trust Strategies
<b>0170</b>	Lessons Learned	<b>0450</b>	Additional Estate Documents
<b>0180</b>	Mutual Funds and Exchange-Traded Funds	<b>0460</b>	Putting Your Knowledge to Work
<b>0190</b>	Why Do People Invest in Mutual Funds and ETFs?	<b>0470</b>	Evaluation Form and Complimentary Consultation
<b>0200</b>	Types of Funds	<b>0480</b>	Thank You
<b>0210</b>	<b>Manage Your Taxes</b>		
<b>0220</b>	Taxes Are Not Equal		
<b>0230</b>	Form 1040		
<b>0240</b>	Why Pay Taxes on Income You Aren't Using?		
<b>0250</b>	Investment Taxes to Consider		
<b>0260</b>	Tax-Favored Investments		
<b>0270</b>	Is Tax-Exempt Investing Appropriate?		
<b>0280</b>	Advantages of Tax-Deferred Growth		